



# Finance Enquiry Form

tel: 07 3171 2923 fax: 07 3056 2143

email: [admin@precisionloans.com.au](mailto:admin@precisionloans.com.au)

Postal: PO Box 5216, Victoria Point QLD 4165

Date of appointment / / 2017 In CRM  Entered by

REFERRED BY:	CONTACT:	BROKER: LYNNE / JASON /
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## INDIVIDUALS

Individual-Applicant 1	Individual-Applicant 2
<b>Capacity of Applicant</b> <input type="checkbox"/> Borrower <input type="checkbox"/> Guarantor <input type="checkbox"/> Joint	<input type="checkbox"/> Borrower <input type="checkbox"/> Guarantor <input type="checkbox"/> Joint
<b>Title</b> <input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Dr	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Dr
<b>Given Names(s)</b>	
<b>Family Name (Maiden &amp; previous names if any)</b>	
<b>Mothers Maiden Name</b>	
<b>Preferred Name i.e. abbrev</b>	
<b>Date of Birth</b> / / (dd/mm/yyyy) Australian Citizen Y / N	/ / (dd/mm/yyyy) Australian Citizen Y / N
<b>Marital Status</b> <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Other:	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Other
<b>Dependants Names, gender &amp; Date of birth</b>	
<b>Your Contact Details</b> Home: _____ Work: _____ Mobile: _____ Email: _____	Home: _____ Work: _____ Mobile: _____ Email: _____
<b>Present Home Address</b> _____ P/Code: _____	_____ P/Code: _____
<b>Describe your home and the date you moved in</b> <input type="checkbox"/> Your Own <input type="checkbox"/> Renting <input type="checkbox"/> Buying <input type="checkbox"/> Living With Relatives <input type="checkbox"/> Boarding / /	<input type="checkbox"/> Your Own <input type="checkbox"/> Renting <input type="checkbox"/> Buying <input type="checkbox"/> Living With Relatives <input type="checkbox"/> Boarding / /
<b>Name of Mortgagee/Landlord</b>	
<b>Previous Address (if less than 3 years)</b> _____ P/Code: _____	_____ P/Code: _____
<b>Dates moved in and out</b> From: / / To: / /	From: / / To: / /
<b>Current Employers Name</b>	
<b>Occupation / Position</b>	
<b>Type of Employment</b> <input type="checkbox"/> Full Time <input type="checkbox"/> Part Time <input type="checkbox"/> Self <input type="checkbox"/> Other	<input type="checkbox"/> Full Time <input type="checkbox"/> Part Time <input type="checkbox"/> Self <input type="checkbox"/> Other
<b>Employment Dates</b> Start: / / Finish: / /	Start: / / Finish: / /
<b>Current Employers Address</b> _____ P/Code: _____	_____ P/Code: _____
<b>Employers Contact Details Contact:</b> Ph: _____ Fx: _____	Ph: _____ Fx: _____
<b>Previous Employer</b>	
<b>Previous Employers Address</b> _____ Ph number: _____ P/Code: _____	_____ P/Code: _____
<b>Previous Employment Dates</b> Start: / / Finish: / /	Start: / / Finish: / /
<b>Drivers Licence &amp; Expiry</b> Issue: / / Expiry: / /	Issue: / / Expiry: / /

Partnership  Company  Trust  Borrower  Joint Applicant  Guarantor

**COMPANIES/TRUSTS/PARTNERSHIPS**

<b>Name</b>			
<b>Postal Address</b>	P/Code		
<b>Phone Nos:</b>	Ph:	Fx:	ABN: ACN:
<b>Year Established</b>	Industry (if applicable):		

**LOAN DETAILS - 1**

Mortgage  Chattel  Lease  Rental  Consumer  Other

Amount \$	Loan Purpose:	P & I <input type="checkbox"/> Interest Only <input type="checkbox"/> ___ yrs	Repayment Frequency: Weekly / Fortnightly / Monthly
Term: years	Variable <input type="checkbox"/> Package Y / N	Fixed <input type="checkbox"/> Fixed Term:	Rate lock fee <input type="checkbox"/> Offset Account <input type="checkbox"/>
Finance Date: / /	Settlement Date: / /	<input type="checkbox"/> Owner Occupied <input type="checkbox"/> Investment <input type="checkbox"/> Business	

**LOAN DETAILS - 2**

Mortgage  Chattel  Lease  Rental  Consumer  Other

Amount \$	Loan Purpose:	P & I <input type="checkbox"/> Interest Only <input type="checkbox"/> ___ yrs	Repayment Frequency: Weekly / Fortnightly / Monthly
Term: years	Variable <input type="checkbox"/> Package Y / N	Fixed <input type="checkbox"/> Fixed Term:	Rate lock fee <input type="checkbox"/> Offset Account <input type="checkbox"/>
Finance Date: / /	Settlement Date: / /	<input type="checkbox"/> Owner Occupied <input type="checkbox"/> Investment <input type="checkbox"/> Business	

**SECURITY DETAILS**

<b>1</b>	Security Value: \$	Existing Debt: \$	Owner: <input type="checkbox"/> Joint or <input type="checkbox"/> First Home Buyer <input type="checkbox"/>		
	Security Address:				P/Code:
	House /Unit /Land /	Bedrooms:	Bathrooms:	Car spaces:	Other:
<b>2</b>	Security Value: \$	Existing Debt: \$	Owner: <input type="checkbox"/> Joint or <input type="checkbox"/>		
	Security Address:				P/Code:
	House /Unit /Land /	Bedrooms:	Bathrooms:	Car spaces:	Other:

**TOTAL COST / REFINANCE**

**SOURCE OF FUNDS**

Value/Purchase price	\$	Loan Amount	\$
Construction costs	\$	Deposit already paid	\$
Stamp Duty on Mortgage	\$	Net Sale Proceeds	\$
Purchase Stamp Duty ( <b>Owned property before?</b> )	\$	Cash/Savings # <b>genuine savings 3 months</b>	\$
Transfer Fees	\$	Gifts – need a stat dec. – not repayable	\$
Registration Fees	\$	Other Loans	\$
Legal fees own solicitor	\$	Other Funds	\$
Other debts being refinanced	\$	Divorce Settlement	\$
Mortgage Insurance	\$	<b>FIRST HOME BUYER? Qualify for Grant</b>	\$
<b>Total</b>	<b>\$</b>	<b>Total</b>	<b>\$</b>

**ADVISORS DETAILS**

<b>Accountant</b>	Authority to contact <b>Y / N</b>	Contact Name & Company:	
Address	P/Code		email:
	Ph:	Fx:	
<b>Solicitor</b>	Authority to contact <b>Y / N</b>	Contact Name & Company:	
Address	P/Code		email:
	Ph:	Fx:	

**REFERENCES – TRADE/PERSONAL**

Company	Branch	Goods/Type	Date Taken Out	Payment	Current	Finalised
1)				\$		
2)				\$		
3)				\$		

Name of nearest relative not living with you	Address	Phone Numbers	Relationship to 1
	State	Postcode	
Name of nearest relative not living with you	Address	Phone Numbers	Relationship to 2
	State	Postcode	

**BANKING DETAILS FOR LOAN REPAYMENTS to come from A/c Name:**

Bank		Branch	
Account Details	<input type="checkbox"/> Savings <input type="checkbox"/> Cheque BSB:	Account Number	

<b>INCOME (gross)</b>	<b>Applicant 1</b>		<b>Notes</b>	<b>Applicant 2</b>		<b>Notes</b>
Salary	\$	W/F/M/Y		\$	W/F/M/Y	
Regular Overtime	\$	W/F/M/Y		\$	W/F/M/Y	
Centre link Payment/Family Allowance	\$	W/F/M/Y		\$	W/F/M/Y	
Existing Rental Income	\$	W/F/M/Y		\$	W/F/M/Y	
Proposed Rental Income	\$	W/F/M/Y		\$	W/F/M/Y	
Investment Income	\$	W/F/M/Y		\$	W/F/M/Y	
Pension	\$	W/F/M/Y		\$	W/F/M/Y	
Other	\$	W/F/M/Y		\$	W/F/M/Y	
<b>TOTAL</b>	<b>\$</b>			<b>\$</b>		

**LIABILITIES & ASSETS**

<b>Liabilities</b>	<b>App No.</b>	<b>Min Mth Repay</b>	<b>Current Balance</b>	<b>Limit</b>	<b>Assets</b>	<b>App No.</b>	<b>Value (\$)</b>
Mortgage Loans: * Bank & last 4 digit of account number % interest rate					Land and Buildings - full address:		
*		\$	\$	\$			\$
*		\$	\$	\$			\$
*		\$	\$	\$			\$
*		\$	\$	\$			\$
*		\$	\$	\$			\$
*		\$	\$	\$			\$
Other Loans:					Furniture Insured with:		
*		\$	\$	\$	<b>Motor Vehicle:</b> Model & Year		\$
*		\$	\$	\$			\$
*		\$	\$	\$			\$
*		\$	\$	\$			\$
*		\$	\$	\$			\$
Credit Cards: Lender & Type					Deposit Paid:		
*		\$	\$	\$	<b>Savings:</b> *		\$
*		\$	\$	\$	*		\$
*		\$	\$	\$	*		\$
*		\$	\$	\$	*		\$
Other Liabilities: i.e. tax, rates?					*		\$
Rent / Board:					*		\$
<b>Total Monthly Liabilities (from above)</b>		<b>\$</b>	<b>\$</b>	<b>\$</b>	*		<b>\$</b>
<b>Comments:</b>					Superannuation *		\$
					Superannuation *		\$
					Other i.e. boat		\$
<b>Monthly Living Expenses Total (of below)</b>		<b>\$</b>					<b>\$</b>
Groceries – Food \$	House Ins \$	Life Ins \$					\$
Private Health \$	Utilities – elec/ph \$	Transport/Fuel \$					\$
Education \$	Personal \$	Other \$					\$

